

CASE STUDY

Integrated planning for the holding without losing flexibility

The Slovak investment group integrated planning across its entities while preserving the flexibility to plan at different levels of detail.

100 %
of plans editable

1 app
for the entire holding

emark



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-  Slovak Republic
 -  Financial services
 -  500+ employees
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Use cases

-  Operational planning with in-app adjustments
 -  Integrated planning across the holding
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Technologies Used

Inphinity Forms
Qlik Sense

Problem

Pro Partners Holding had long relied on Excel for planning. As the number of subsidiaries grew and the organizational structure became more complex, this approach could no longer keep up. Planning also differed from one entity to another, making it difficult to establish an integrated process across the holding. At the same time, individual companies needed to retain the flexibility to plan according to their specific requirements, from detailed operational planning to higher-level views. The group therefore needed a more structured planning process that would connect planning across entities while preserving the flexibility of individual companies.

Solution

EMARK helped Pro Partners Holding create an integrated planning structure across its entities while preserving their specific planning requirements. Users can select the relevant data and planning periods and edit planning data directly in the application. This created a faster, clearer and more transparent planning process across the holding, with better visibility of changes and easier control over individual plans.

Before

-  The tool could not keep pace with the growth and complexity of the holding structure
-  Planning differed from entity to entity, without an integrated structure
-  Excel was the main planning tool across the group
-  Limited transparency of changes made to plans

After

-  Ability to select relevant data and periods for planning
-  Planning data edits directly in the app through write-back functionality
-  Integrated planning structure for all holding entities
-  Automatic and transparent change tracking



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Solution

-  A unified planning environment across the holding
-  Planning scenarios adapted to the needs of individual entities
-  Clearer planning through the ability to select relevant data and planning periods
-  Direct editing of planning data without relying on external files and manual versioning
-  Automatic change tracking supporting transparency, traceability and easier corrections
-  Integrated planning structure across entities while reflecting their specific requirements

Qlik and Inphinity helped simplify planning and bring an integrated structure to the entire process. We also see added value in the ability to select the data and periods to plan from. It is essentially a matter of just a few clicks. As a result, the entire planning process is faster, simpler, clearer, and the work of project managers more efficient.

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Are you still planning in Excel and hitting its limits as your company grows?

Let's explore how integrated, flexible planning could work in your organization as well.



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